



WISCONSIN

DEPARTMENT OF WORKFORCE DEVELOPMENT

Division of Economic Support

Bureau of Work Support Programs

**TO: Economic Support Supervisors
Economic Support Lead Workers
Training Staff
Child Care Coordinators
W-2 Agencies**

FROM: Stephen M. Dow
Policy Analysis & Program Implementation Unit
Work Programs Section

BWSP OPERATIONS MEMO

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Non W-2 ☒ **W-2** ☐ **CC** ☐

PRIORITY: High

SUBJECT: MEDICAL ASSISTANCE --- JOINT ASSETS

CROSS REFERENCE: MA Handbook, Appendix 11.3.0 & 11.3.2

EFFECTIVE DATE: Immediately

PURPOSE

This memo revises the joint account policy for all SSI-related Medicaid (MA) eligibility determinations, including Medicaid Purchase Plan, Institutions, and Community Waivers. It will result in a single, consistent policy for joint accounts that would be applicable to both AFDC and SSI-related MA cases.

BACKGROUND

The current joint account policy for SSI-related cases would have you count either the full value or a proportionate share of the funds on deposit in a joint account. The appropriate amount would depend upon with whom the SSI-related applicant/recipient owns the account. To arrive at the correct policy decision, you have to know if the other owners of the joint account are either SSI-related applicants/recipients, AFDC-related applicants/recipients, or individuals who are neither AFDC or SSI-related applicants/recipients. This policy has been historically confusing to all concerned parties due to its complexity and inconsistency with other public assistance programs, including AFDC-related Medicaid. In the spirit of program simplification, we have decided to request a Medicaid State Plan amendment to reflect the new policy for SSI- related joint accounts.

POLICY

Joint accounts for all MA determinations will be handled as they are currently for AFDC-related cases. Follow the “equal share” concept that is presently described in MA Handbook Appendix 11.3.1 for both AFDC- and SSI-related eligibility determinations.

The result of this policy change is that all jointly owned assets (e.g., real estate, savings accounts, certificates of deposit, etc.) will be counted in the same manner, proportionate to the number of owners, for all types of MA.

The AFDC- or SSI-relatedness as well as the applicant/recipient status of the joint account owners will not be relevant with this policy revision. The primary consideration will now merely be the actual number of account owners and nothing more.

CARES

CARES was changed on 7/1/00 to reflect this new policy.

CONTACT

DES CARES & Policy Call Center	Email:	<u>carpolcc@dwd.state.wi.us</u>
	Telephone:	(608) 261-6317 (Option #1)
	Fax:	(608) 261-6968

Note: Email contacts are preferred. Thank you.